Executive summary

Today's buyers are doing extensive research before contacting sales, making it critical for sales and marketing teams to work together to win new business. Marketing needs to be able to find, qualify, and nurture leads that the sales team can convert into customers. Having a shared responsibility for meeting sales goals requires seamless integration between your marketing automation and Salesforce CRM systems.

For companies with Salesforce CRM, Adobe Marketo Engage is a natural choice. Marketo Engage provides a superior, closed-loop connection that ensures marketing can provide sales with the most promising leads. Marketo Engage's native integration with Salesforce CRM empowers revenue teams with the automation, flexibility, granularity, and scalability that paves the way for success...all with minimum dependency on IT support.
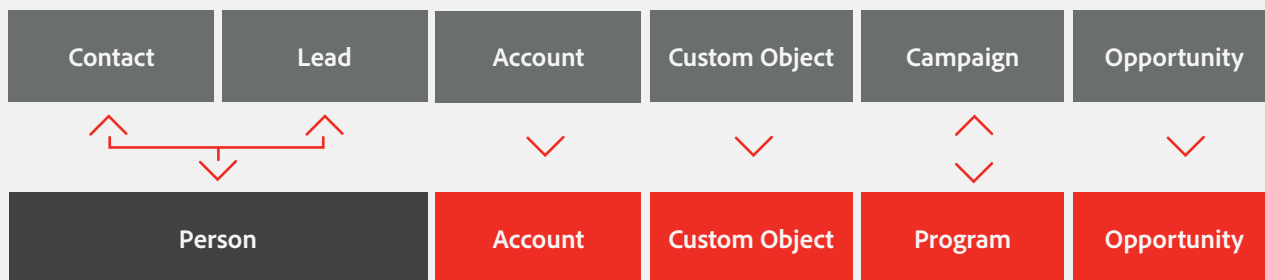
Your organization can most effectively convert potential customers when your teams understand the context and purpose of prospect engagement through every stage of the buying journey. Marketing can no longer just deliver an MQL (marketing qualified lead) to sales and expect the deal to close. True alignment between marketing and sales means collaborating to provide timely responses to the best opportunities. Collaboration is made possible by automatic, seamless, and fast two-way synchronization of information between the sales and marketing automation systems.

Create smart marketing campaigns in minutes

Marketo Engage Connector for Salesforce CRM

salesforce **Salesforce CRM**

Contact	Lead	Account	Custom Object	Campaign	Opportunity

Person	Account	Custom Object	Program	Opportunity

Adobe Marketo Engage

With the Marketo Engage Connector for Salesforce CRM in place, sales reps receive timely access to leads through real-time alerts. When your marketing team adds qualified leads to Salesforce CRM, they include rich details as sales people are alerted to each revenue opportunity. With a complete picture of each prospect's history, sales reps respond faster and can better address the prospect's motivations for purchasing. The seamless handoff process prevents leads from falling through the cracks between marketing and sales. The alignment of your Salesforce CRM and Marketo Engage systems naturally aligns your team members and processes, providing your organization with a competitive edge.

> *Sales team members can quickly and effortlessly review all lead-related activity without leaving Salesforce.*

Marketo makes it easy for marketing to quickly qualify leads based on up-to-the-minute customer behaviors. When Marketo Engage identifies high-value activities, like a lead status changing from warm to hot, updates are automatically sent to Salesforce CRM in real time. This feature prevents update fatigue, by only providing sales reps with focused, actionable data.

Figure 1: Drag and Drop To Create Audiences

Streamline Salesforce CRM campaigns

Because of the bi-directional data flow between Marketo Engage programs and Salesforce CRM campaigns, your marketing and sales teams are freed from manually creating and updating their own Salesforce CRM campaigns. As a result, campaigns run smoothly and effectively, with minimal work by your sales team.

Contact names can be selected in either Salesforce CRM or Marketo Engage, and both systems will show them as campaign members. Whether marketing sends a campaign email through Marketo Engage or Salesforce CRM, the entire revenue performance team knows what is happening. Your marketing team can even create and report on a Salesforce campaign within Marketo Engage.

When leads and contacts are added in Salesforce, Marketo Engage can automatically filter and trigger relevant campaigns. Both marketing and sales can work in the system they are most familiar with, while being sure they are seeing accurate, up-to-date information about each campaign member.

Figure 2: Sync Salesforce Campaigns

Managing audience targeting and selection

Marketo Effective management of contact, lead, and account ownership is essential to a smooth experience that paves the way for converting a prospect to a customer.

Marketo automatically syncs leads, contacts, and accounts with Salesforce, along with selected related custom objects, like the record owner (sales rep or account manager). Marketing professionals can easily filter and create lists based on any of the attributes in the synchronized objects. Communications can be set up to come directly from the record owner, which increases email open rates.

Marketo can also assign new leads and contacts to the right person or Salesforce queue for follow-up.

Figure 3: Assign Sales Owners

Tasks enforce SLA compliance

A service level agreement (SLA) is an understanding between marketing and sales, ensuring that a lead receives the appropriate attention in a timely manner. While SLAs are critical to revenue team alignment and avoiding lead degradation or stagnation, they are not effective unless tracked and upheld.

Marketo Engage automatically monitors all tasks and events created by sales, tracks SLA due dates, and sends alerts about violations. This information is shared in Salesforce CRM, triggering updates and setting task deadlines, such as when to follow up on a lead.
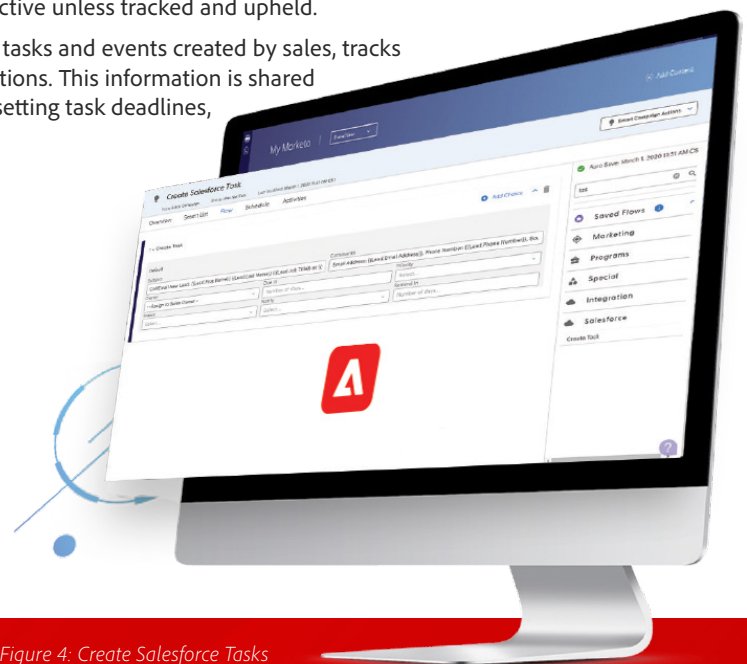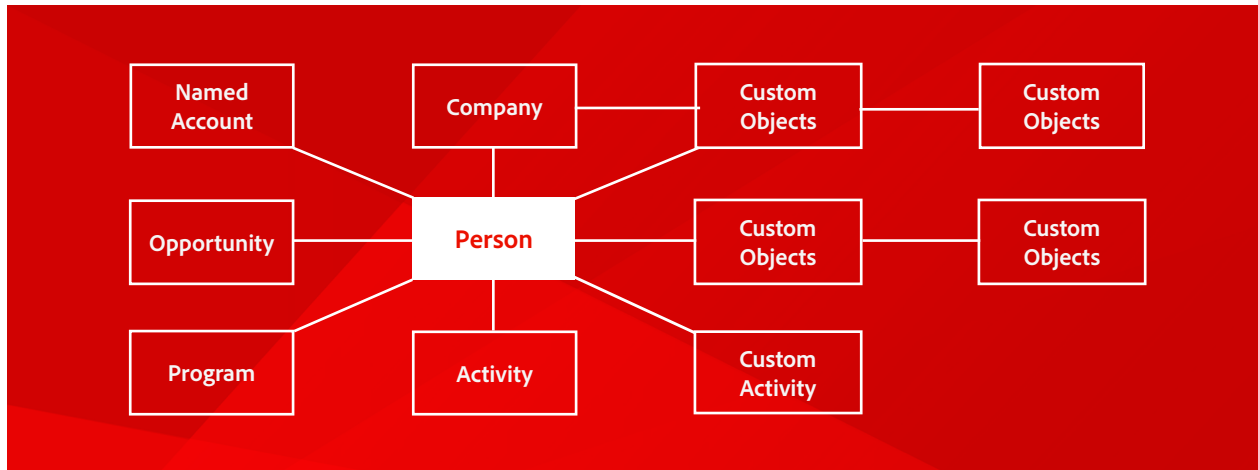
Figure 4: Create Salesforce Tasks

Use related data to enhance audience targeting

Out-of-the-box objects such as account, lead, contact, and opportunity are built into Marketo Engage and natively synchronized with Salesforce CRM, along with any custom objects related to these records. A simple checkbox indicates which custom objects and fields are pertinent in both systems. Marketers can build campaigns, filtering or referencing these custom objects, to personalize the customer experience.

Named Account	Company	Custom Objects	Custom Objects
Opportunity	**Person**	Custom Objects	Custom Objects
Program	Activity	Custom Activity	

Customers can extend the out-of-the-box data model to include related custom objects (tables) such as product ownership, class registration, upcoming appointments, sh opping cart status, and more!

Setup as easy as 1-2-3

The Marketo Salesforce Connector is easy to set up. Working with your Salesforce administrator, all you need to do is:

1   **2**   **3**

Configure sync profile in Salesforce CRM.

Configure Salesforce CRM connection in Marketo Engage.

Select objects and fields to sync from Salesforce.

Standard objects (account, contact, lead, and opportunity) are automatically synced for you.

Changes to the Salesforce schema are kept up to date with every sync.

Figure 5: Salesforce Schema Is Always In Sync

Minimum IT support required

Marketo Engage was designed to be configured and managed with minimum dependency on IT support. Salesforce CRM and Marketo Engage administrators can easily work together to configure both platforms to work synergistically, giving your revenue teams the real-time intelligence they need to achieve their sales goals.

For more information about Marketo Engage, please visit www.marketo.com.